# Trends in Montgomery County:
*A Look at People, Housing, and Jobs Since 1990*

Civic Federation
May 13, 2019
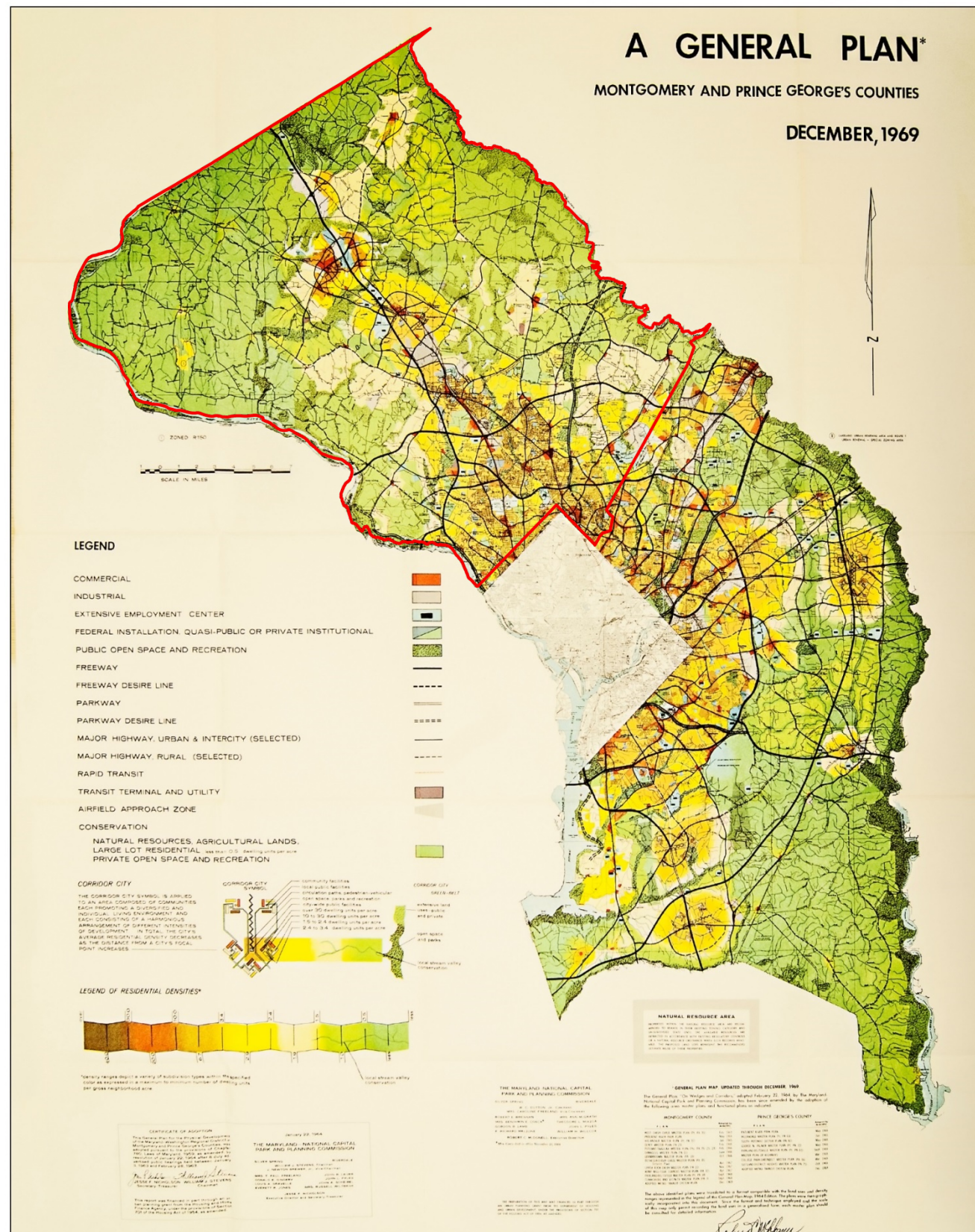
**RESEARCH + SPECIAL PROJECTS**
A DIVISION OF THE MONTGOMERY COUNTY PLANNING DEPARTMENT

# 1964 General Plan "...on Wedges and Corridors"

# 1969 General Plan and its Implementation



Increase Affordable Housing → MPDU Law

Protect Farmland → TDRs

Guide Timely Infrastructure → APFO

# Why Update the General Plan?

- The last comprehensive update was in **1969**

- The county changed from a **bedroom community** to a **major employment center** with a **diverse population** of more than 1 million people

- We are entering another era of **disruptive technologies** and **cultural shifts**

- Now is the time to step back and create a **visionary plan** for the next 30 years

- Change is an opportunity to **thrive**

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# Montgomery County is growing at a slower pace than in past decades

**Most populous county in Maryland**

**Million-plus population since 2012**
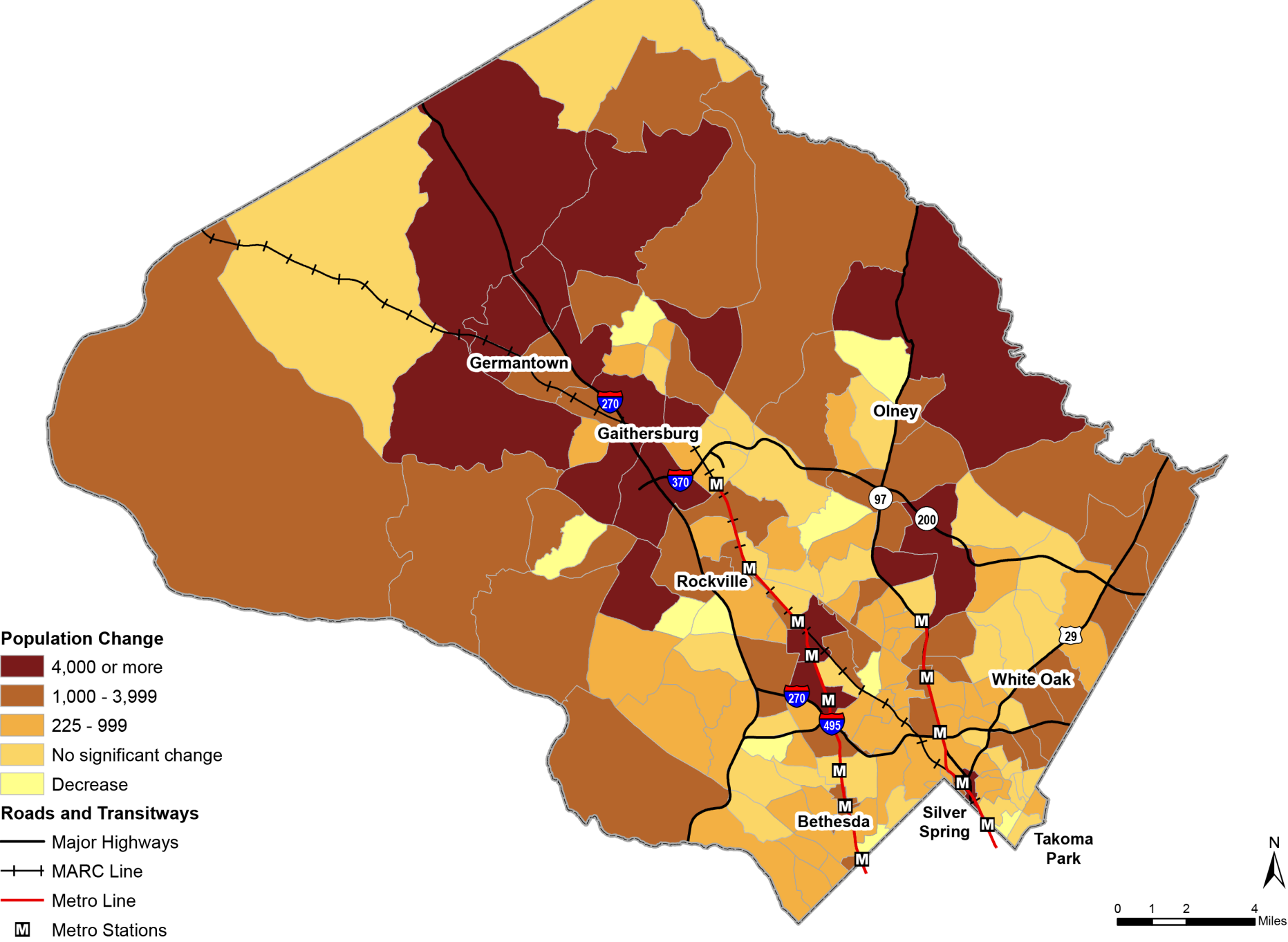
**38% population increase since 1990**

2017: 1,058,800

1990: 765,500          +293,300
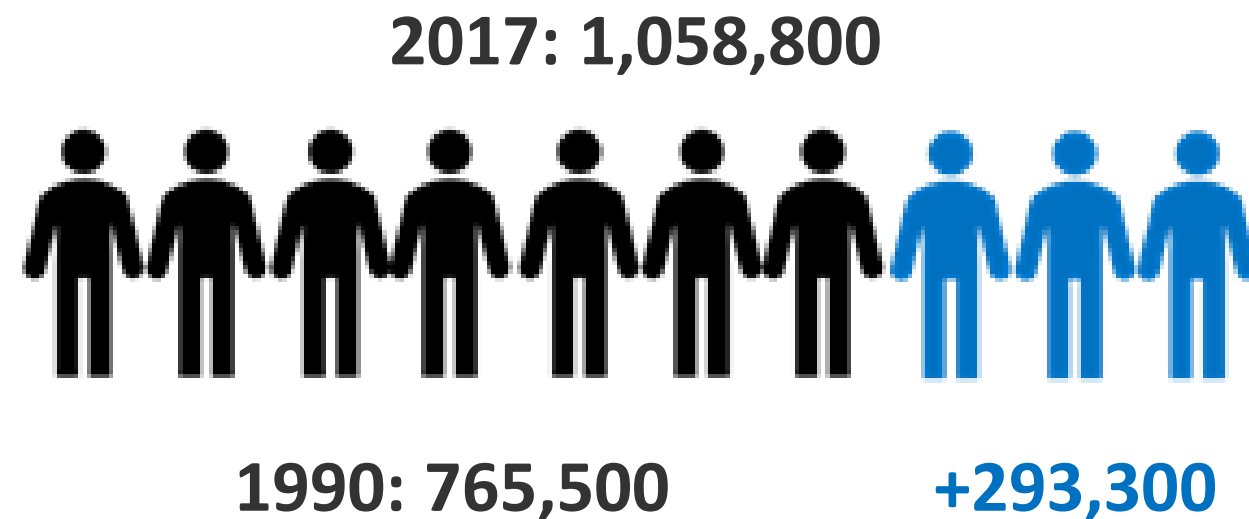
**Decreasing gain and rate of growth since 1990**



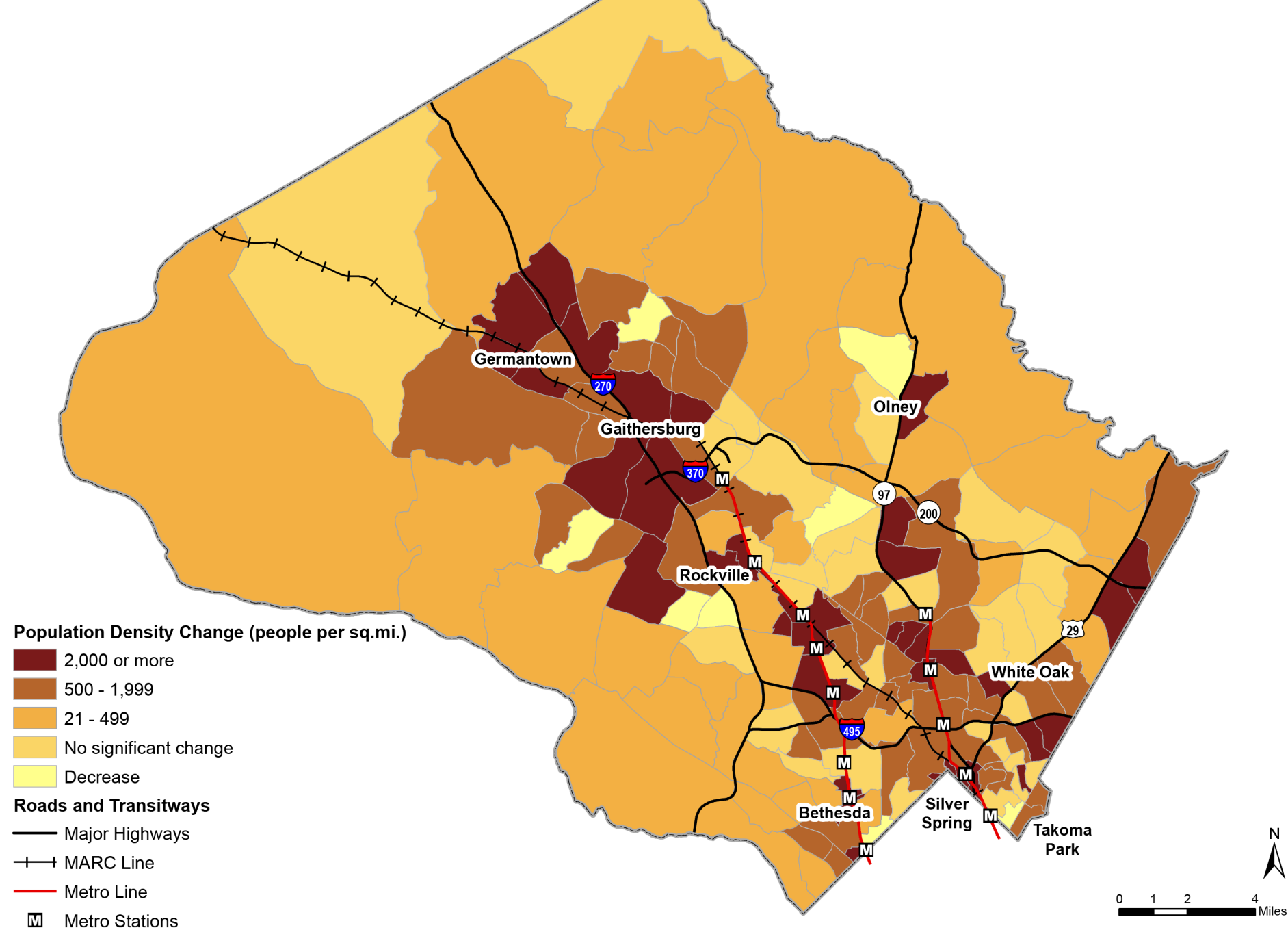- Absolute Growth
- Percentage Growth
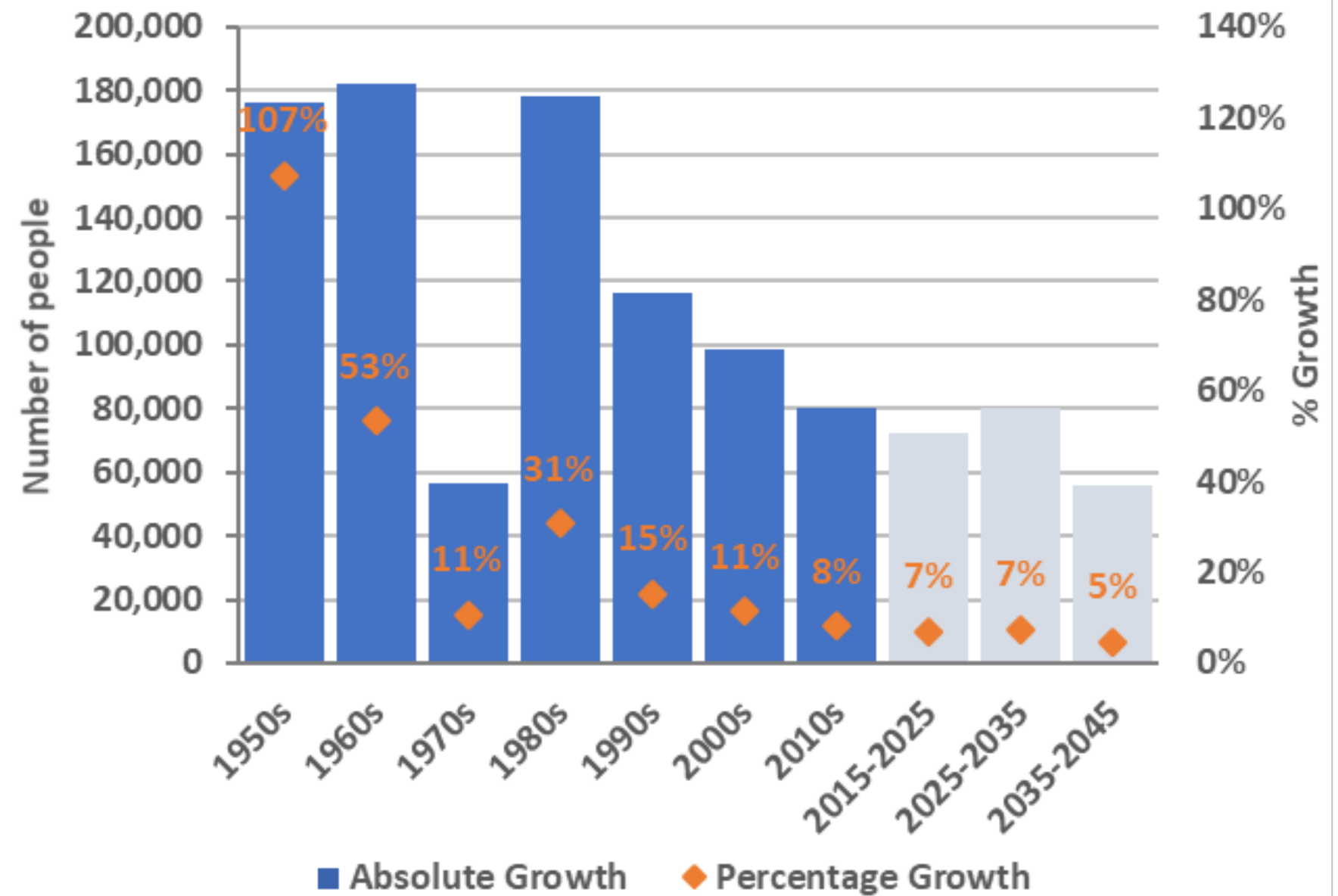
# Most of the growth occurred in outskirts & along transit corridors



**Map 3. Population Change, 1990-2016
by Census Tract**
Montgomery County, Maryland

Germantown
Olney
Gaithersburg
Rockville
White Oak
Bethesda
Silver Spring
Takoma Park

**Population Change**
- 4,000 or more
- 1,000 - 3,999
- 225 - 999
- No significant change
- Decrease

**Roads and Transitways**
- ─── Major Highways
- ┼┼┼ MARC Line
- ─── Metro Line
- Ⓜ Metro Stations

N

0  1  2  4 Miles

Source: 1990 Census and 2012-2016 American Community Survey 5-year estimate, U.S. Census Bureau. Created by: M-NCPPC, Research and Special Projects Division

**Map 4. Population Density Change, 1990-2016
by Census Tract**
Montgomery County, Maryland

Germantown
Olney
Gaithersburg
Rockville
White Oak
Bethesda
Silver Spring
Takoma Park

**Population Density Change (people per sq.mi.)**
- 2,000 or more
- 500 - 1,999
- 21 - 499
- No significant change
- Decrease

**Roads and Transitways**
- ─── Major Highways
- ┼┼┼ MARC Line
- ─── Metro Line
- Ⓜ Metro Stations

N

0  1  2  4 Miles

Source: 1990 Census and 2012-2016 American Community Survey 5-year estimate, U.S. Census Bureau. Created by: M-NCPPC, Research and Special Projects Division

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# Immigration contributes to significant diversity

**Increasing foreign-born population**

2016: 344,645
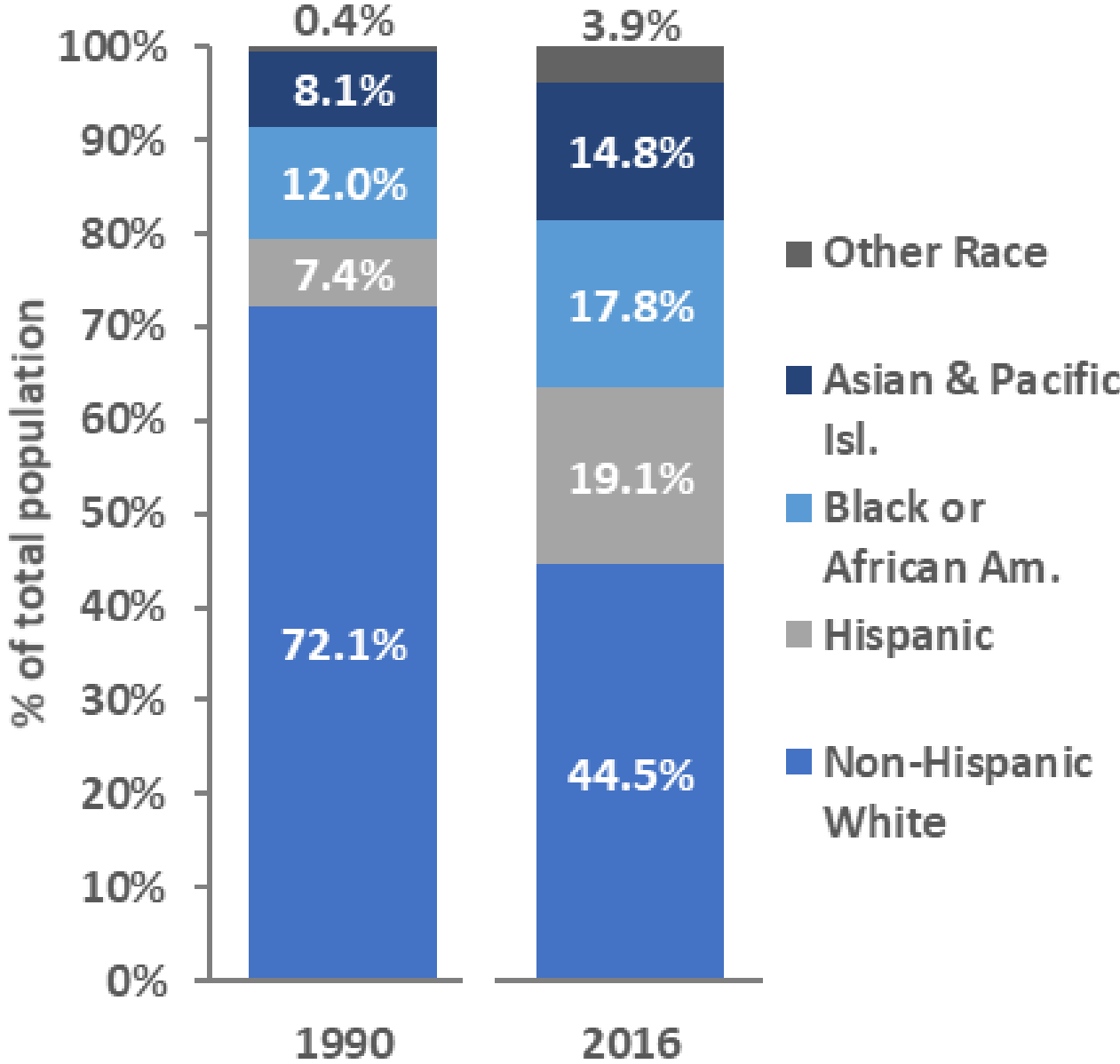
1990: 141,166    +203,500 (59%)

**Up from 19% in 1990 to 33% in 2016**

**Majority from Latin America (37%) & Asia (37%)**

1) El Salvador (47,792, 14%)
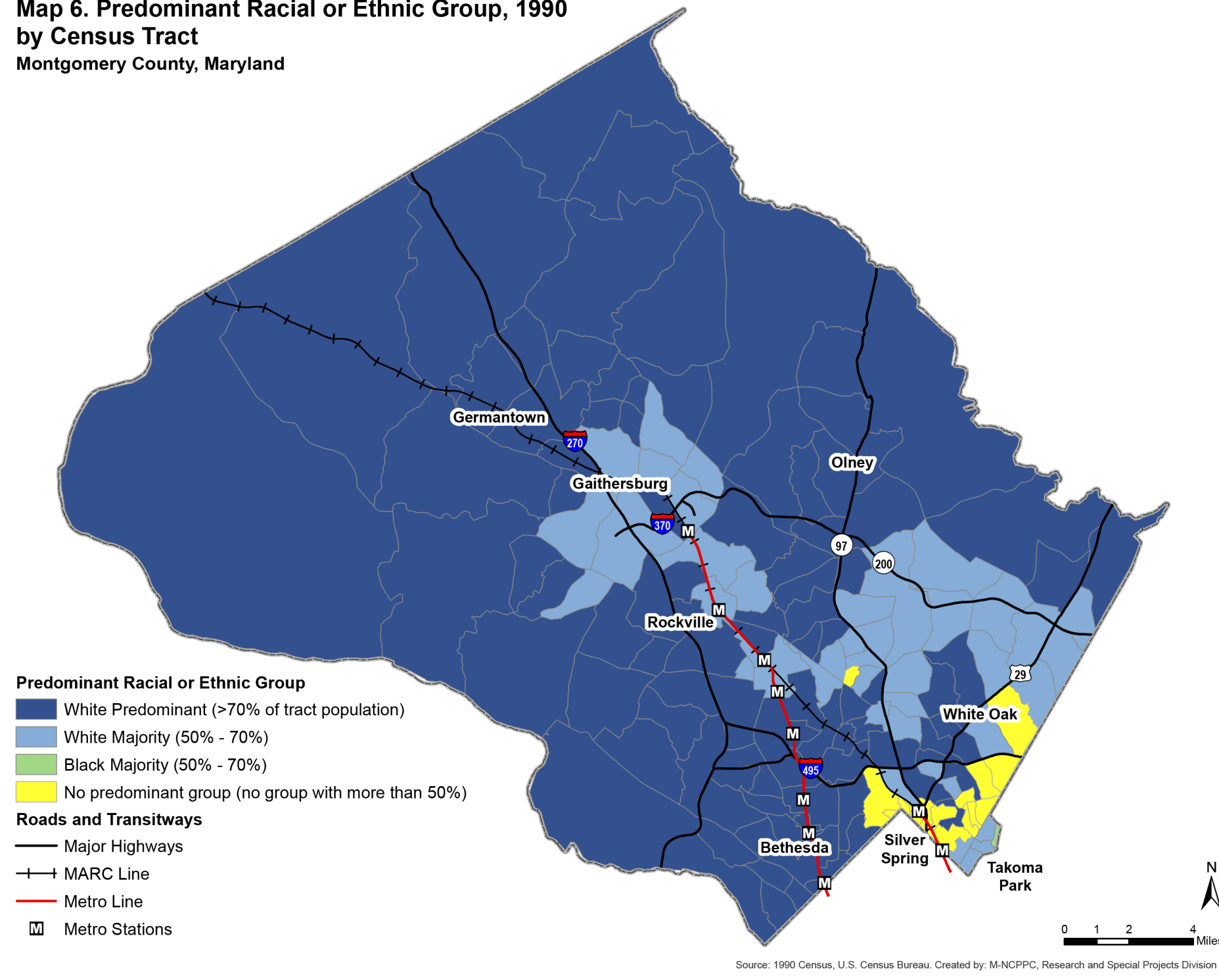2) China (28,243, 8%)
3) India (24,306, 7%)

**Greater racial & ethnic diversity**

*People of Color: 579,397 (56%)*



% of total population

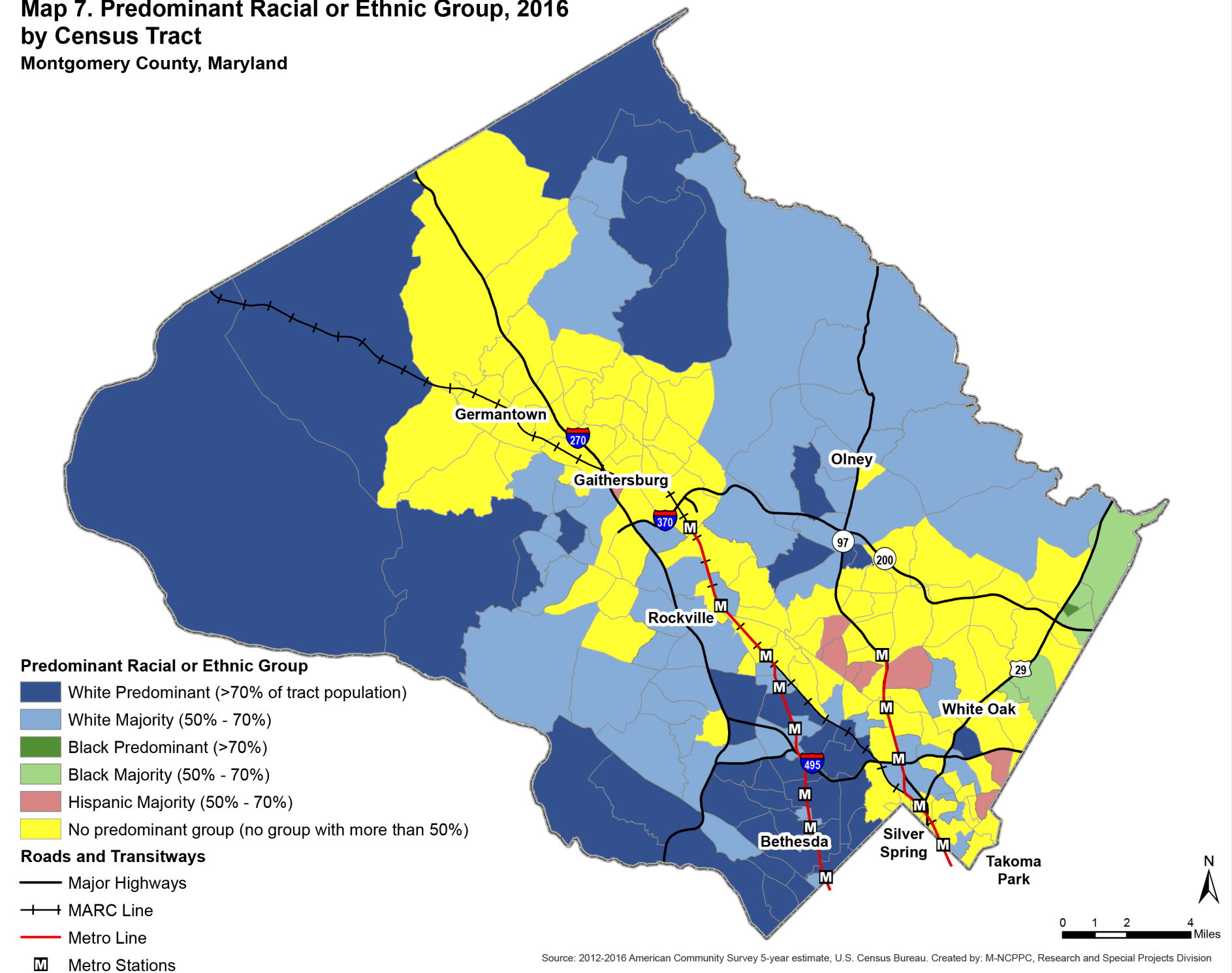| | 1990 | 2016 |
|---|---|---|
| Other Race | 0.4% | 3.9% |
| Asian & Pacific Isl. | 8.1% | 14.8% |
| Black or African Am. | 12.0% | 17.8% |
| Hispanic | 7.4% | 19.1% |
| Non-Hispanic White | 72.1% | 44.5% |

# Racial & ethnic diversity is increasingly distributed across the county



Map 6. Predominant Racial or Ethnic Group, 1990
by Census Tract
Montgomery County, Maryland

**Predominant Racial or Ethnic Group**
- White Predominant (>70% of tract population)
- White Majority (50% - 70%)
- Black Majority (50% - 70%)
- No predominant group (no group with more than 50%)

**Roads and Transitways**
- Major Highways
- MARC Line
- Metro Line
- M Metro Stations

Source: 1990 Census, U.S. Census Bureau. Created by: M-NCPPC, Research and Special Projects Division

Map 7. Predominant Racial or Ethnic Group, 2016
by Census Tract
Montgomery County, Maryland

**Predominant Racial or Ethnic Group**
- White Predominant (>70% of tract population)
- White Majority (50% - 70%)
- Black Predominant (>70%)
- Black Majority (50% - 70%)
- Hispanic Majority (50% - 70%)
- No predominant group (no group with more than 50%)

**Roads and Transitways**
- Major Highways
- MARC Line
- Metro Line
- M Metro Stations

Source: 2012-2016 American Community Survey 5-year estimate, U.S. Census Bureau. Created by: M-NCPPC, Research and Special Projects Division
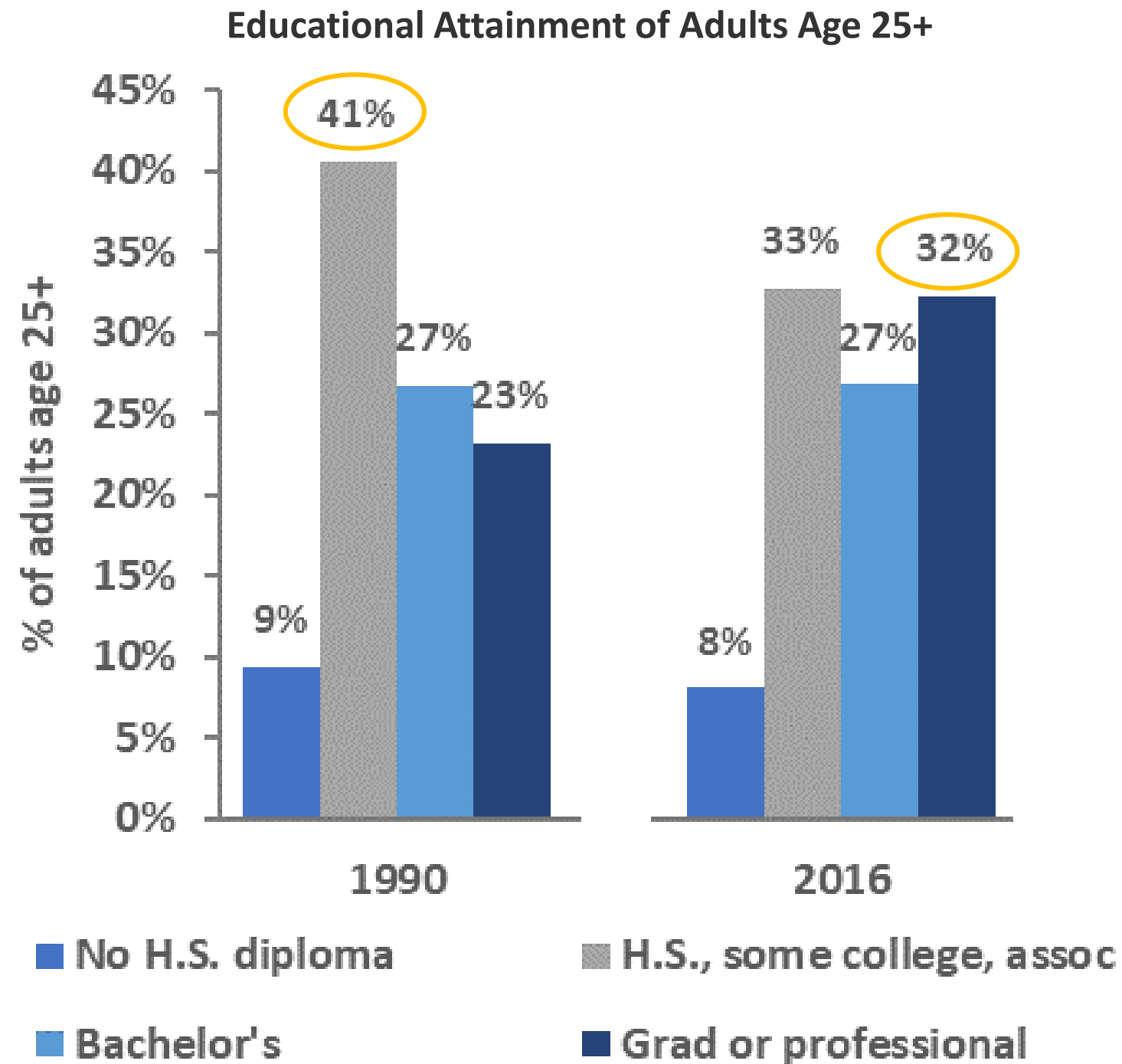
# Increasingly older population driven by aging baby boomers

## Percentage of Population by Age Group
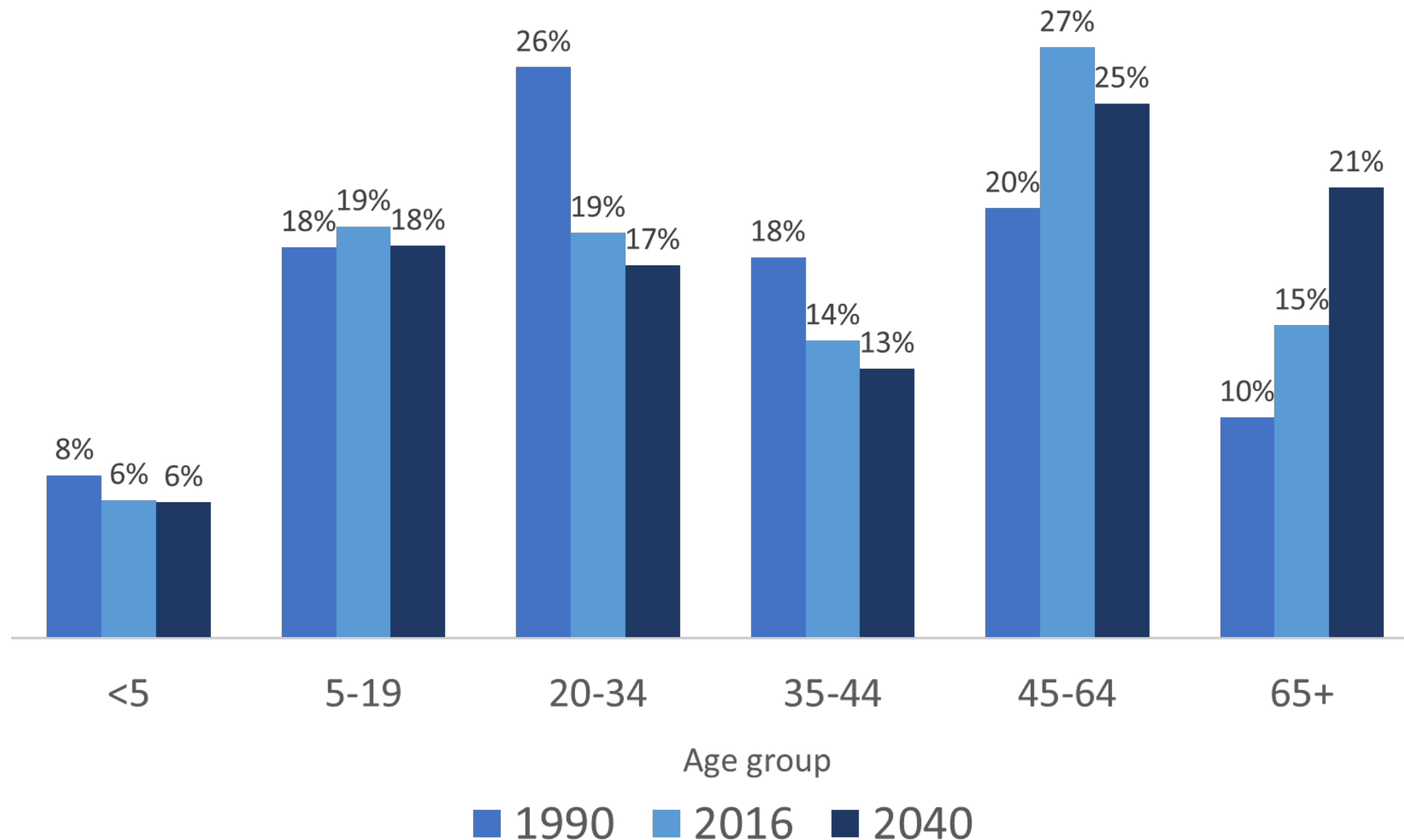


- **Age of baby boomers:**
  1990: 26 to 44
  2016: 52 to 70
  2040: 76 to 94

- **Increased median age:**
  33.9 years in 1990
  39 years in 2016

Legend: ■ 1990 ■ 2016 ■ 2040

Age group: <5, 5-19, 20-34, 35-44, 45-64, 65+

<5: 8%, 6%, 6%
5-19: 18%, 19%, 18%
20-34: 26%, 19%, 17%
35-44: 18%, 14%, 13%
45-64: 20%, 27%, 25%
65+: 10%, 15%, 21%

# Gains in educational attainment

**Educational Attainment of Adults Age 25+**



**Highly educated adult residents:**

- 59% have BA degrees compared to 50% in region

- Concentration of advanced degrees 5th in US

- High levels of educational attainment correlated with management, business and science jobs and high median income households

# Types of households stabilize after 1990

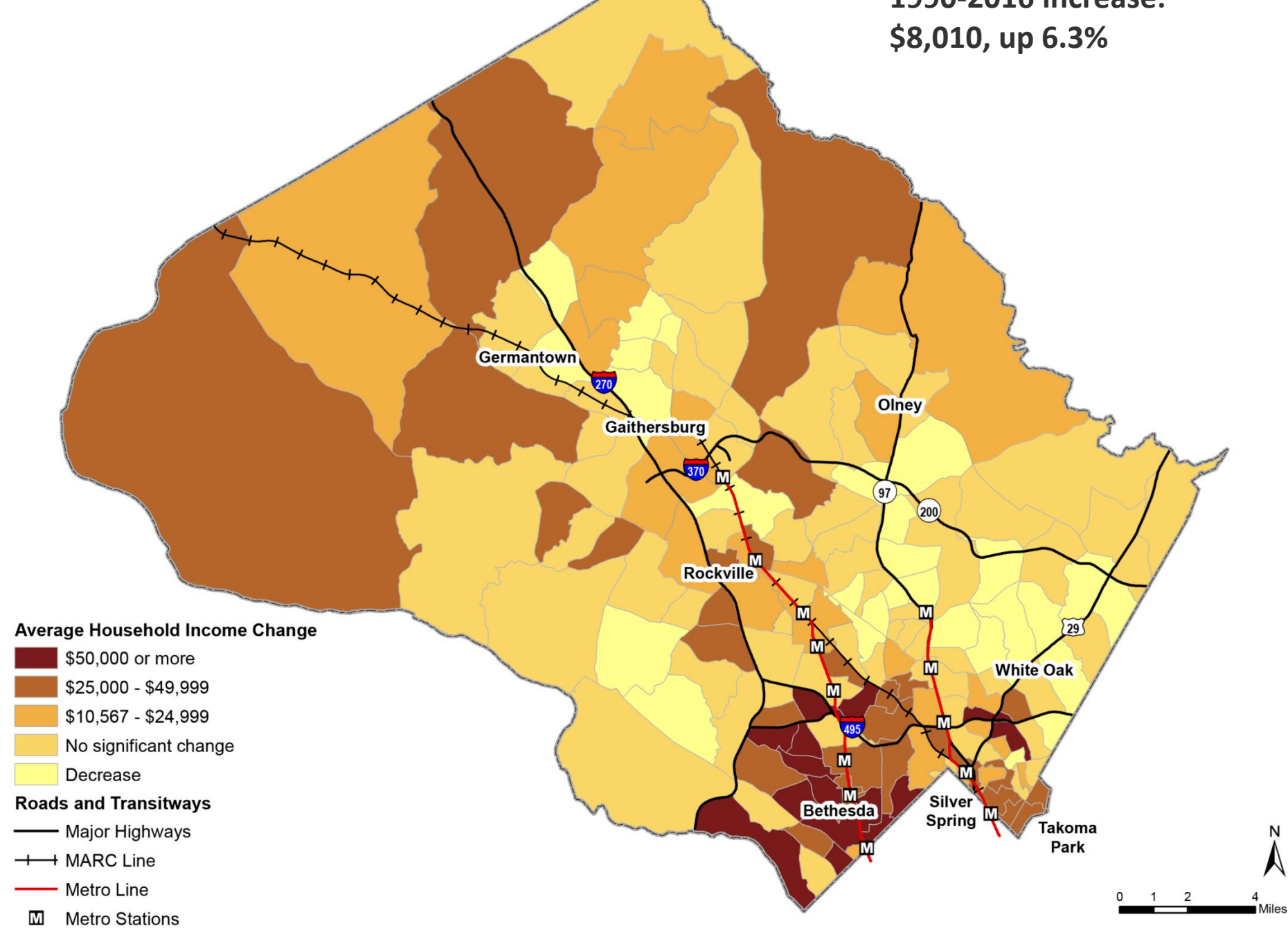**Wider variety of household types since 1960, but distribution relatively stable since 1990**
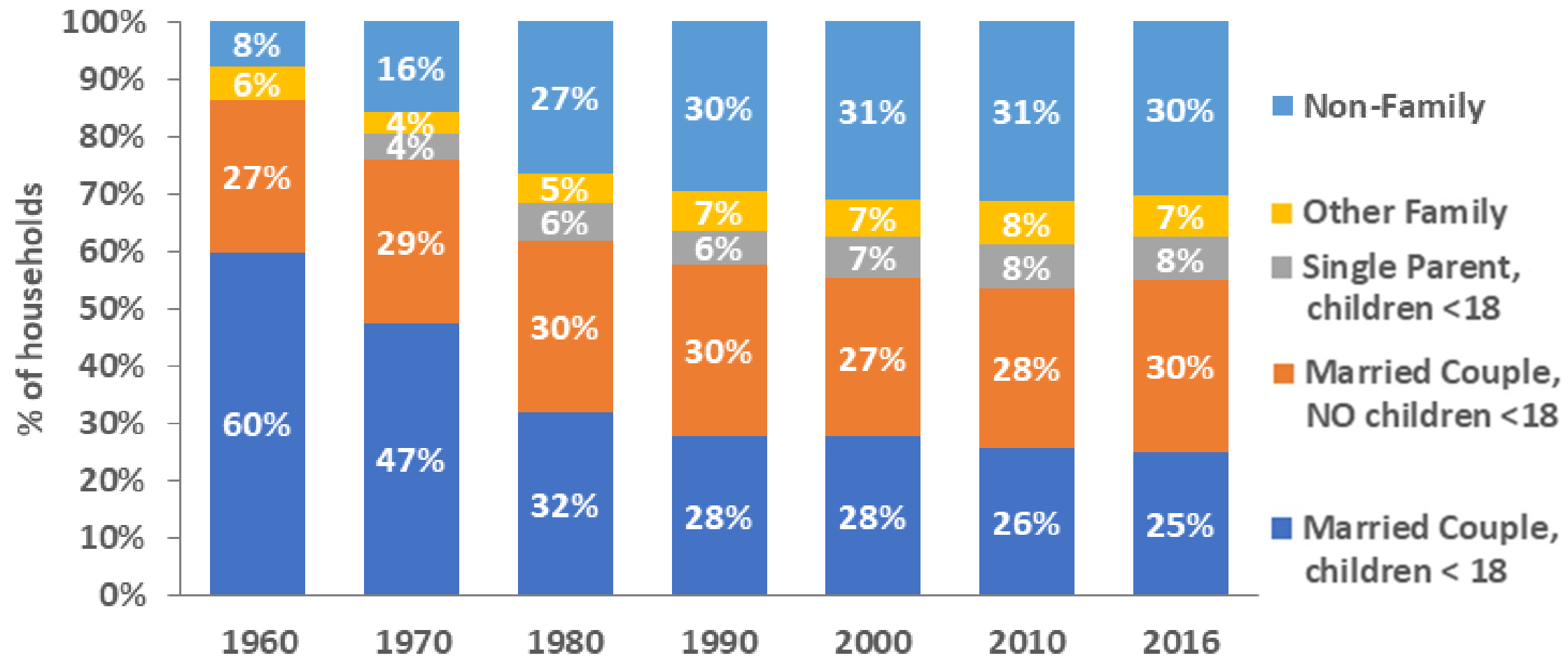


- **Non-family households are the most common household type since 2000**

- **Since 1990, married-couples with children < 18 are less common than:**
  - Married-couples with NO children < 18
  - Non-family households

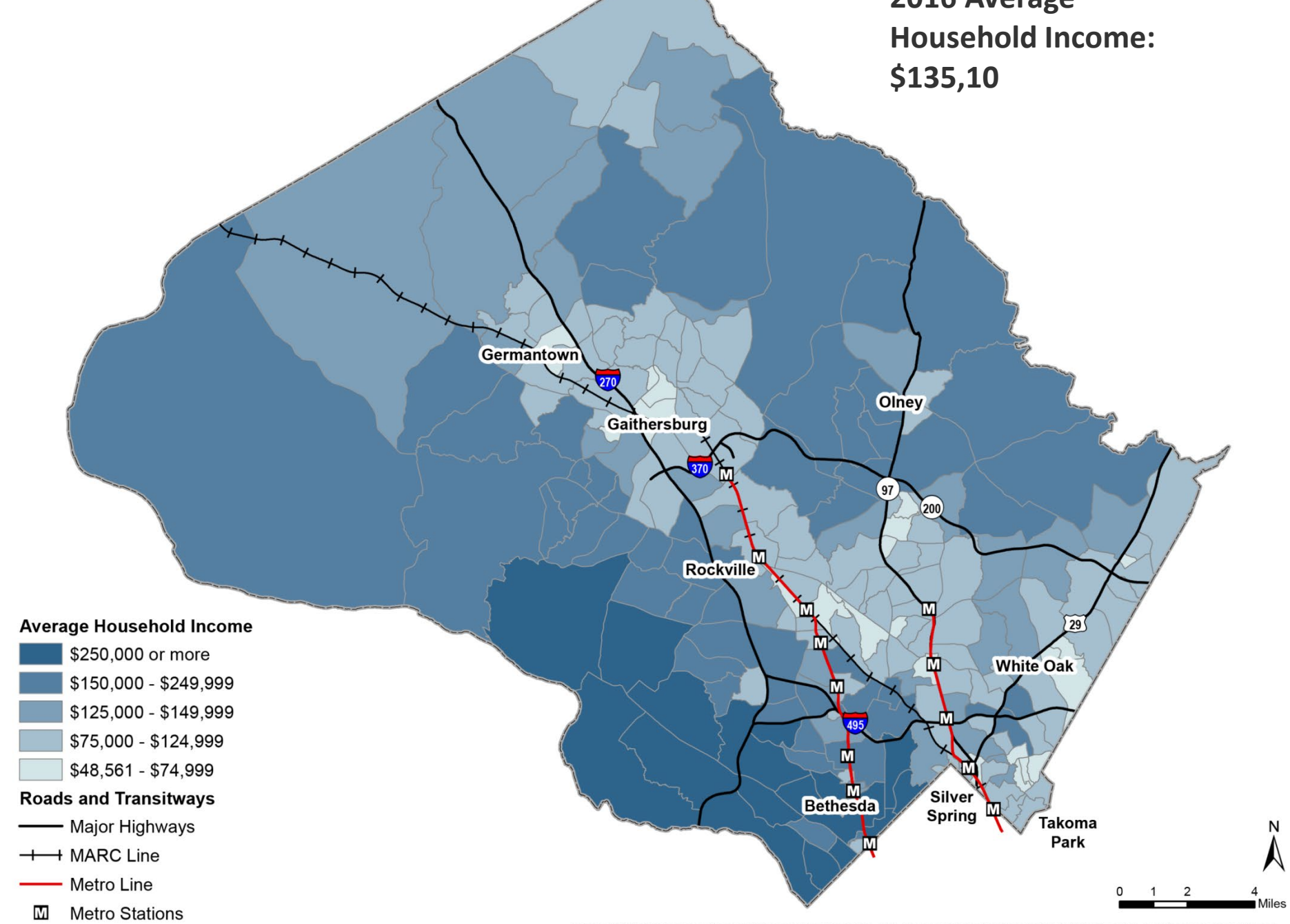# Change in household income from 1990 to 2016



**Map 12. Average Household Income Change, 1990-2016 by Census Tract**
Montgomery County, Maryland
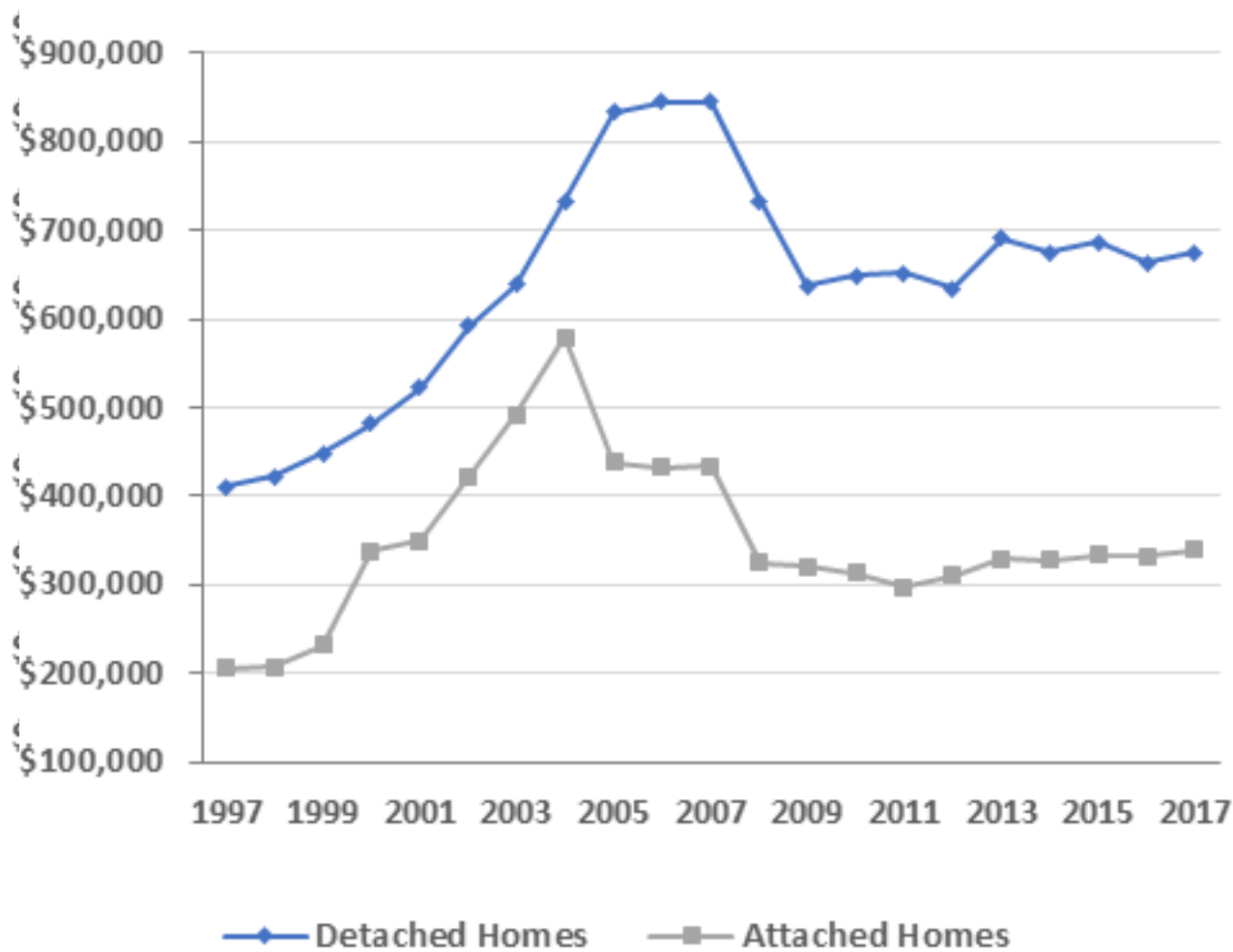
**1990-2016 increase: $8,010, up 6.3%**

**Average Household Income Change**
- $50,000 or more
- $25,000 - $49,999
- $10,567 - $24,999
- No significant change
- Decrease

**Roads and Transitways**
- Major Highways
- MARC Line
- Metro Line
- M Metro Stations

Source: 1990 Census and 2012-2016 American Community Survey 5-year estimate, U.S. Census Bureau. Created by: M-NCPPC, Research and Special Projects Division



**Map 11. Average Household Income, 2016 by Census Tract**
Montgomery County, Maryland

**2016 Average Household Income: $135,10**

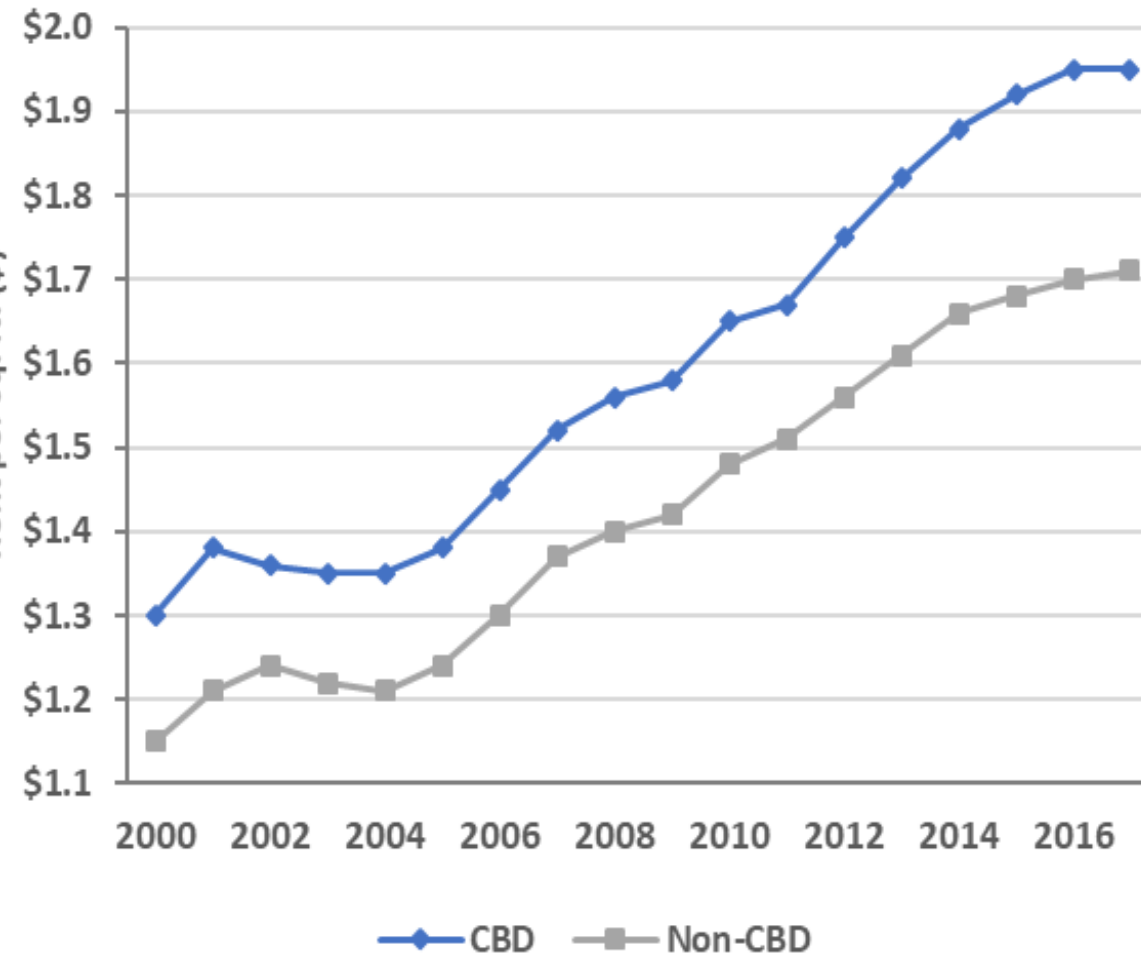**Average Household Income**
- $250,000 or more
- $150,000 - $249,999
- $125,000 - $149,999
- $75,000 - $124,999
- $48,561 - $74,999

**Roads and Transitways**
- Major Highways
- MARC Line
- Metro Line
- M Metro Stations

Source: 2012-2016 American Community Survey 5-year estimate, U.S. Census Bureau. Created by: M-NCPPC, Research and Special Projects Division

# Increases in housing prices have outpaced income growth.

### Average Sale Price



Legend: Detached Homes, Attached Homes

### Average Rent PSF



Legend: CBD, Non-CBD

### Median Income



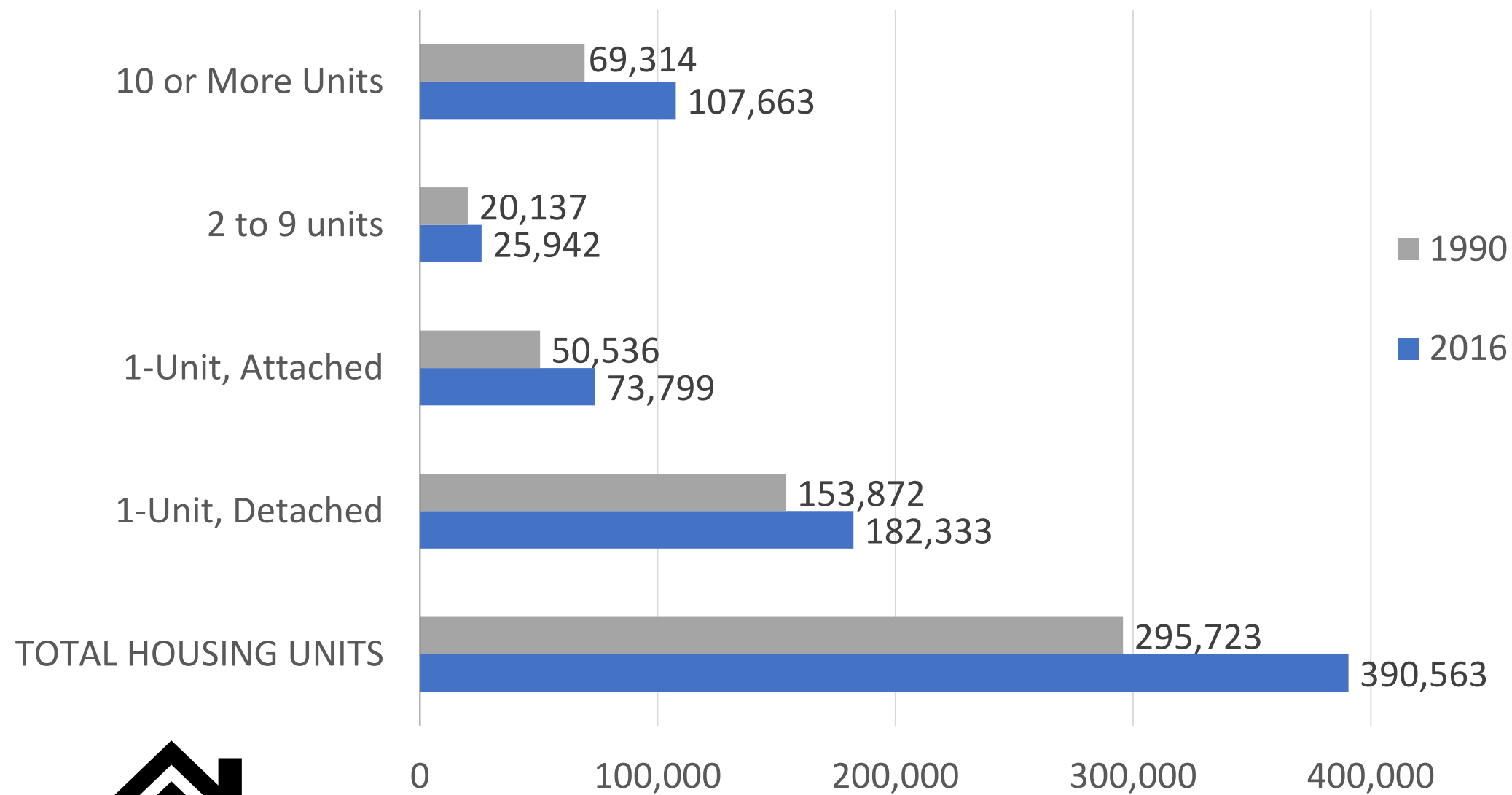| Year | Median Income |
|------|---------------|
| 1979 | $89,421 |
| 1989 | $101,123 |
| 1999 | $103,143 |
| 2007 | $106,307 |
| 2010 | $98,115 |
| 2016 | $99,763 |
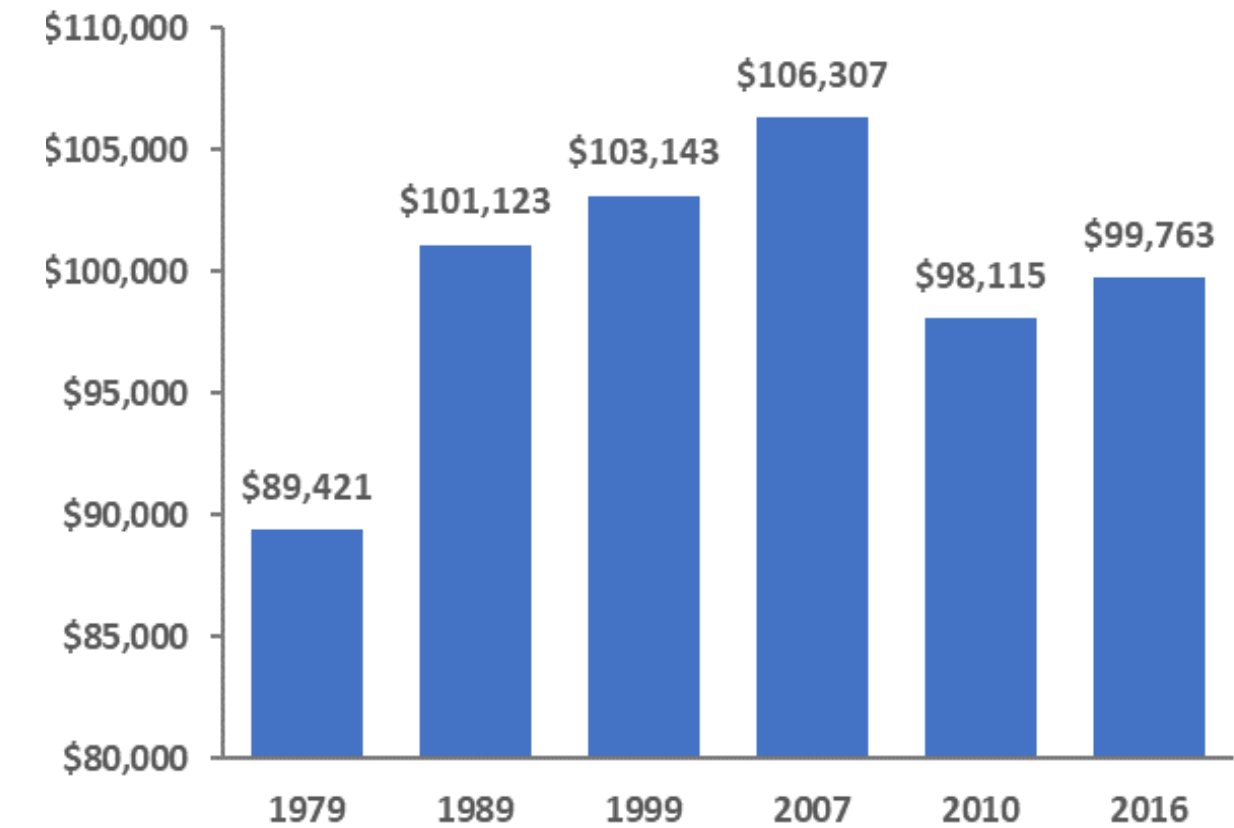
*All dollar values adjusted for inflation*

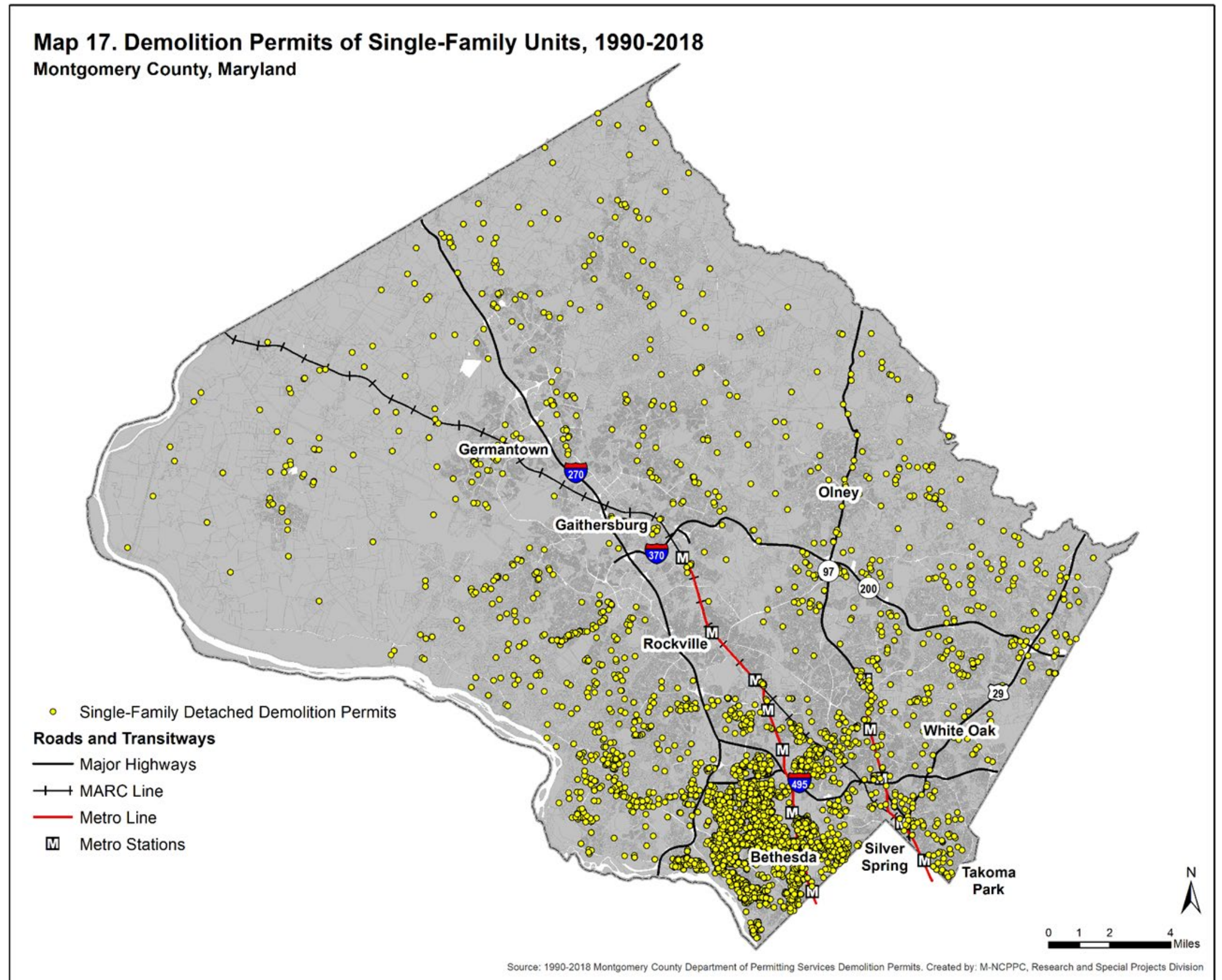# Growth of multifamily housing outpaced all other types

**Number of housing units by type**

| Type | 1990 | 2016 |
|------|------|------|
| 10 or More Units | 69,314 | 107,663 |
| 2 to 9 units | 20,137 | 25,942 |
| 1-Unit, Attached | 50,536 | 73,799 |
| 1-Unit, Detached | 153,872 | 182,333 |
| TOTAL HOUSING UNITS | 295,723 | 390,563 |

- **32% increase** in the number of housing units from **295,723 to 390,563**

- **49% increase** in the number of multi-family units

- **25% increase** in the number of single family units

# Housing unit teardowns concentrated down-county and primarily single-family

- **4,400** demolition permits issued for single-family homes since 1990

- **150** teardowns per year, on average

- **6 multi-family buildings** were torn down or redeveloped since 1990
  - 756 units were demolished
  - 1,784 units added
  - 1,028 net new units yielded from redevelopment



**Map 17. Demolition Permits of Single-Family Units, 1990-2018**
Montgomery County, Maryland

Germantown
Olney
Gaithersburg
Rockville
White Oak
Bethesda
Silver Spring
Takoma Park

○ Single-Family Detached Demolition Permits
**Roads and Transitways**
— Major Highways
—+— MARC Line
— Metro Line
Ⓜ Metro Stations

0 1 2 4 Miles

Source: 1990-2018 Montgomery County Department of Permitting Services Demolition Permits. Created by: M-NCPPC, Research and Special Projects Division

# Increase in the number of older homeowners and decrease in the number of younger homeowners

- Increase in 75+ homeowners

- Decrease in younger homeowners

- Demand shifts:
    - Population changes
    - Affordability
    - Product diversity

**Homeownership Rate by Age**



Legend: < 35 | 35-44 | 45-54 | 55-64 | 65-74 | 75+ | Total
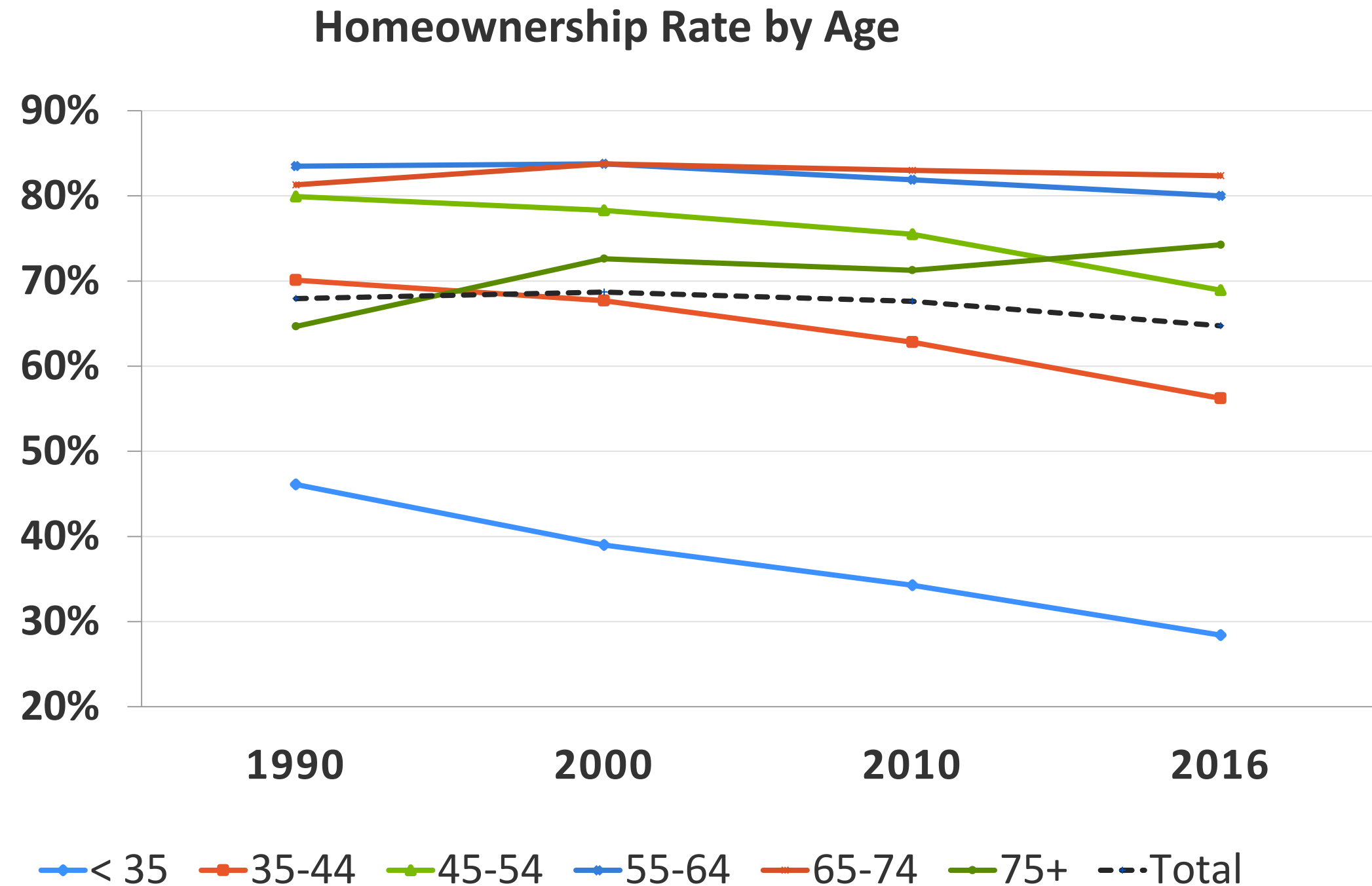
Source:1990-2010 Census, 2016 American Community Survey, 1-year estimate U.S. Census Bureau.

# A large workforce **lives** here

Nearly **600,000** in 2016 – **2nd largest regionally**

Workforce **grew 31%** since 1990

Most (**60%**) work in the county

**Aging residents** remain in the workforce

# Sizes of job sectors remained stable
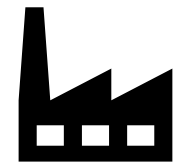
Private sector: 68-73%

Federal government: 13-15%

State/local government: 8%

Self-employed: 6-7%

# The top two industries employed 40% of residents in 2016, compared to 33% in 1990.
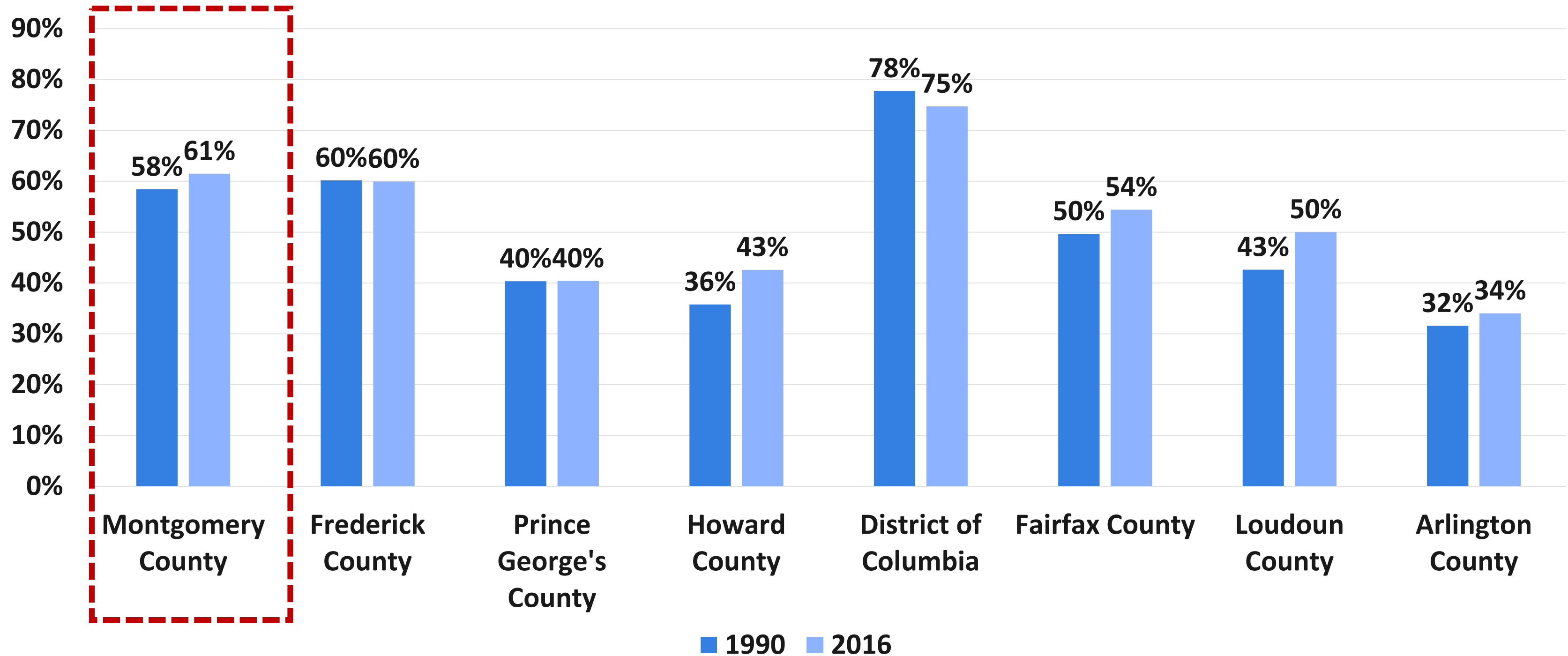
**Resident employment, by industry**

*600,000 residents in the workforce*

*2nd largest workforce in the region*



Number of resident workers

Education, health, social services

Professional, scientific, management, administrative, waste mgmt. services

Public administration

Arts, entertainment, recreation, accommodation, food services

Retail

FIRE

Other Services

Construction

Information

Transportation, warehousing, utilities
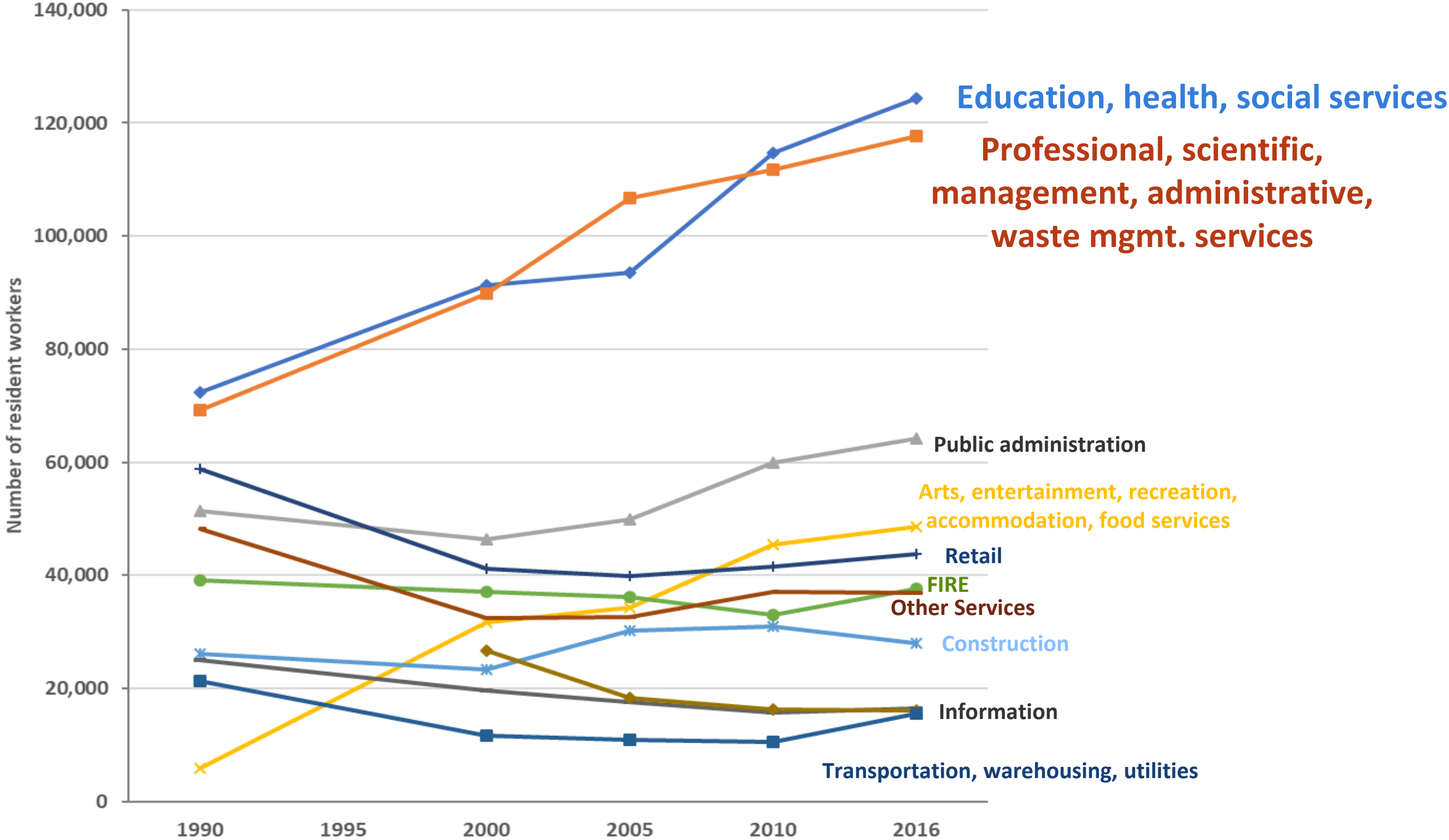
# Most residents live and work in Montgomery County.

# More people are working at home.

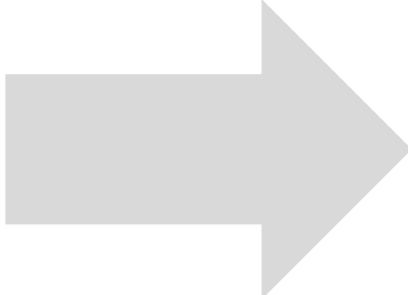*Percentage of resident workers who work at home*
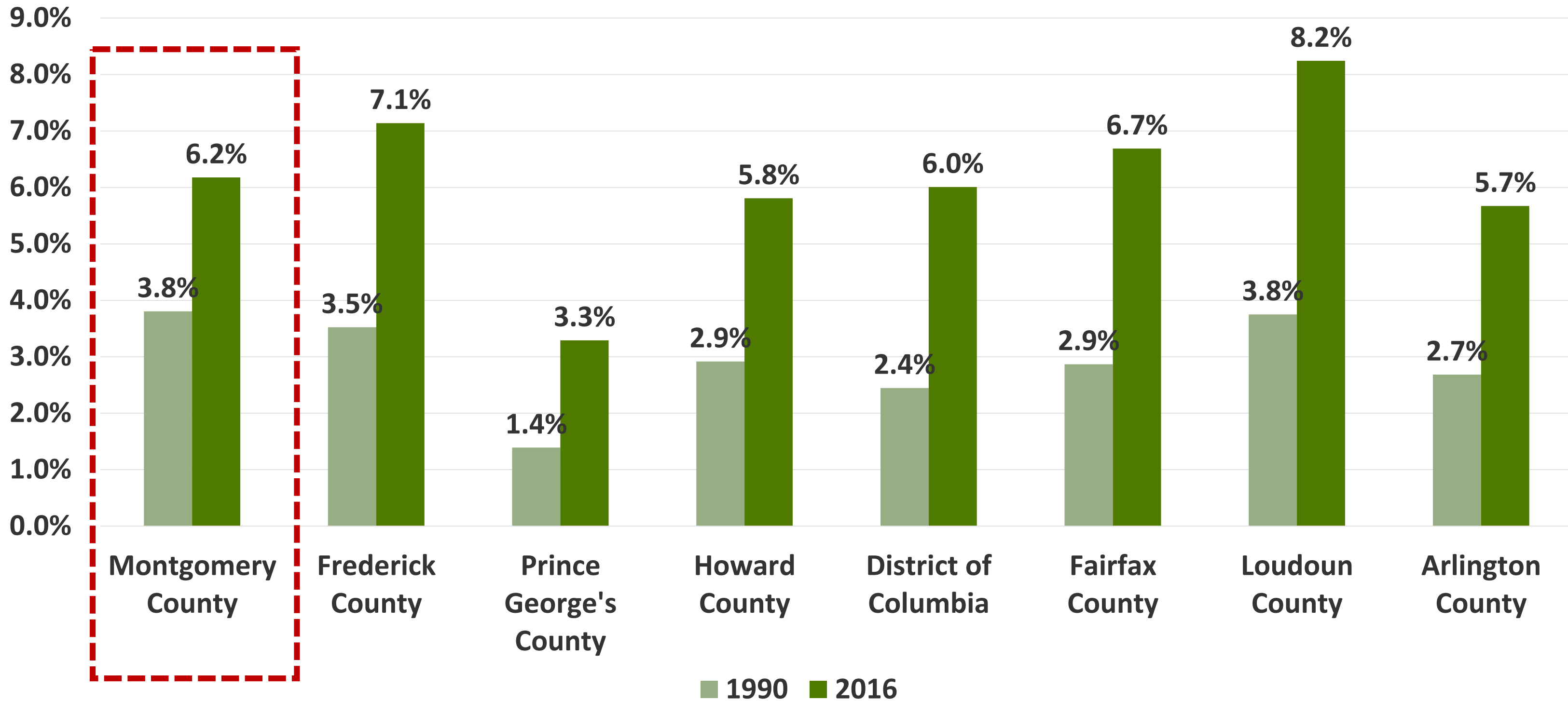
# The number of QCEW jobs in the county increased by 21% since 1990 to 460,0000 in 2016.

*The sizes of the sectors have remained stable over time, according to data in the Quarterly Census of Employment and Wages (QCEW)*

81% Private sector

10% Federal government

9% Local government

Professional, scientific and technical services is the largest at 65,000

Health care and social assistance grew the fastest at 111%

Retail and construction jobs experience greatest declines

# Implications for General Plan Update

- Increasing diversity
  - Population
  - Housing

- Aging demographics

- Incomes haven't kept up with costs

- Employment stable, but challenges remain

- Shift from development to **re**development

# THANK YOU!

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